



Nonprofit Agency Fundholder Benefits

At the Community Foundation for Southern Arizona, we are committed to helping you assist your clients in achieving their philanthropic goals. By partnering with the Community Foundation, you make it easier for your clients to give effectively, help them receive tax benefits they may not realize on their own, and help inspire and support them making a difference now and forever.

When donors establish a fund through the Community Foundation, they open the door to a broad range of charitable options. The Community Foundation can manage virtually any type of gift for most charitable purposes, offering a convenient, effective and powerful way to impact the community.

How does the Community Foundation Assist Professional Advisors?

We partner with you. We provide support, information, and expertise related to charitable giving options.

We are experts in charitable giving. We tailor giving plans to meet your clients' particular needs, whether it's setting up an alternative to a private foundation or putting together a complicated estate plan.

We are experts on our community. Our program staff monitors all areas of community need—including human services, education, the environment, health care, the arts, and economic development. We can help your clients learn more about local agencies and programs that make a difference in the areas they care about most.

We help you connect across generations. When you help families establish endowed funds with us, they (and you) can stay involved for generations.

We help your clients donate a variety of assets. These might include cash, appreciated securities, retirement funds, life insurance, and real estate. These can be assets they give now or later as part of their estate plans. As a public charity, we offer federal and state tax benefits. Starting a fund at a community foundation is significantly less expensive, and easier, than starting a private foundation.

You can help make a difference in the lives of your clients. By partnering with us, you may be able to help your clients increase their current income, increase their beneficiaries' inheritance, leave a legacy in the community, and teach their children about philanthropy.



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The Community Foundation for Southern Arizona (CFSA) offers many services to assist nonprofits in building their assets. Through our Philanthropic Services Department, nonprofits may open endowed or non-endowed funds with a minimum of \$10,000, and benefit from our investment and planned gift expertise to build the funds.

Benefits of Having a Nonprofit Agency Fund at CFSA:

- CFSA has the infrastructure to accept any type of gift
- Donors may contribute to a nonprofit agency fund at any time
- Access to exclusive workshops on topics such as Estate Planning, Board Development, Tax Law Reform, and Nonprofit Endowments at the Community Foundation Campus
- Planned giving educational seminars for your board or constituents
- One-on-one consultations as needed with CFSA's planned giving experts
- Review of your organization's planned giving materials
- A 50% discount twice per year on any event or meeting space reservation at the Community Foundation Campus

Current (Cash) Gifts Include:

- Individual Retirement Account Distribution (QCD)
- Cash
- Credit Card
- Securities
- Life Insurance
- Tangible Personal Property
- Real Estate

Planned Gifts Include:

- Charitable Gift Annuities
- IRA Beneficiary Designation
- Will or Trust
- Charitable Remainder Trust
- Charitable Lead Trust
- Life Estate

For more information, please contact:

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